

FINANCIAL ANALYST/PLANNER SERIES

Code No.	Class Title	Occ. Area	Work Area	Prob. Period	Effective Date
4787(0114)	Financial Analyst/Planner I	01	355	6 mo.	02/10/94
4788(0114)	Financial Analyst/Planner II	01	355	6 mo.	09/10/97
4789(0114)	Financial Analyst/Planner III	01	355	6 mo.	02/10/94

Promotional Line: 334

Series Narrative

Employees in this series provide analyses, plans, and program evaluation studies intended to improve institutional decision making as it relates to the efficient use of financial and other resources. In their work the employees apply advanced analytical techniques; financial, economic, and decision-support theory; and long-range, comprehensive perspectives. Their work may apply to all organizational levels and time frames, but it tends to support senior or middle management in strategic and operational activities, particularly as they affect middle- and long-term financial conditions. All levels of this series require professional-level skills in financial analysis, planning techniques, data modeling, aggregate data analysis, decision-support techniques, and computer system development and usage. The higher levels are distinguished by the complexity and wide range of the analyses performed and are involved in the management of the unit's analytical projects.

DESCRIPTIONS OF LEVELS OF WORK

Level I: Financial Analyst/Planner I **4787(0114)**

Employees at this level are entry level professionals who apply analytical skills to a limited range of financial applications. They work under general supervision from a higher level analyst/planner or other designated supervisor.

A Financial Analyst/Planner I typically--

1. performs simple financial analyses as specified by higher level staff: collects source information, analyzes data according to the most appropriate quantitative or qualitative methods, and prepares reports of findings
2. supports institutional or departmental management by performing research and analysis to assist planning projects
3. performs simple program evaluation studies, assessing the efficiency or resource-allocation decisions: following approved methodologies, compares original program objectives to actual performance; determines causes of performance lags and develops improvement options
4. prepares, tests, and implements financially oriented computer programs and data models in accordance with system specifications and departmental procedures, including the preparation of computer programs and datasets, the acquisition and refining of inputs, and the specification of desired outputs and interfaces; documents application systems, including system support procedures and user materials

5. maintains and enhances existing analytical databases and automated data models, including the review, assessment, and solution of system problems and the specification and development of required changes
6. provides training to beneficiaries of studies, ensuring their understanding and appropriate utilization of the research products: develops appropriate documentation and study guides; demonstrates analyses and findings in both formal and informal settings
7. performs other related duties as assigned

Level II: Financial Analyst/Planner II**4788(0114)**

Employees at this level are experienced professionals who apply analytical skills in a wide variety of non-routine planning, analytical, and evaluative applications and in model developments. These individuals serve as project leaders and may provide supervision to lower level analysts. They work under direction from a designated supervisor.

A Financial Analyst/Planner II typically--

1. performs non-routine financial analyses, planning projects, program evaluation studies, and computer-based modeling projects; these are characterized by reliance upon sophisticated, often novel, methodologies, and applications
2. serves as project leader on assigned research projects: establishes work plans and time schedules; may supervise day-to-day activities of lower level staff, ensuring that they perform according to pre-established plans
3. prepares project specifications for analytical, planning, evaluative, and system-related projects: reviews project needs to determine information needs; develops study approaches, methodologies, and product designs; works with management and professional staff in the user departments to ensure that work products reflect their informational need
4. trains staff regarding analytical techniques, data sources, and approved study approaches associated with assigned projects
5. develops new analytical procedures, methods, and applications for use by staff
6. performs other related duties as assigned

Level III: Financial Analyst/Planner III**4789(0114)**

Employees at this level are highly experienced professionals who develop, direct, and/or perform all manner of analytical and planning functions in support of managerial decision making. The employees supervise professional analyst groups, including the coordination of project teams. They employ sophisticated analytical techniques and resources in the performance of the most complex of projects. They work under administrative direction from a designated administrator.

A Financial Analyst/Planner III typically--

1. supervises a professional level section organized to perform the university's/agency's financial analysis, planning, evaluation, and financial modeling projects: assigns projects to project leaders, coordinating their efforts; plans, assigns, and reviews work activities and final products
2. performs the most complex financial analyses, planning projects, program evaluation studies, and computer-based modeling projects assigned to the unit; typically these projects require the development of new techniques and applications; they frequently are characterized by their significant institutional impact
3. assists university/agency management in determining the overall financial research agenda: supports management in assessing emerging areas of fiscal concern and in identifying appropriate studies to assist in management of these conditions
4. aids management in applying financial research study results to all manner of resource allocation decisions: provides technical advice and analytical support
5. establishes policies, procedures, and guidelines to govern the unit's performance of analytical projects
6. performs other related duties as assigned

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:

Level I: Financial Analyst/Planner I

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CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one or any combination of the following types of preparation:
 - (a) progressively more responsible experience in developing financial or economic analyses, research designs, strategic plans, or data models
 - (b) credit for college course work comparable to that leading to a major in a field related to financial analysis/planning (such as finance, planning, economics, or operations research)

that totals 1.0 unit according to the following conversion rates:

3 years of "a" = 1.0 unit

120 semester hours (or Bachelor's degree) of "b", with 12 hours in empirical fields (such as statistics or computer science) = 1.0 unit

Amounts of experience or training less than those listed above should be converted to decimal equivalents of 1.0 unit and added together when computing combinations of the different types of preparation.

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

None

Level II: Financial Analyst/Planner II**4788(0114)**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. possession of credential requirements listed for the Financial Analyst/Planner I
2. Any one or any combination of the following types of preparation:
 - (a) work experience comparable to that gained as a Financial Analyst/Planner I
 - (b) credit for graduate level college course work comparable to that leading to a major in a field related to financial analysis/planning (such as finance, planning, economics, or operations research)

that totals 1.0 unit according to the following conversion rates:

9 months of "a" = 1.0 unit

30 semester hours (or Master's degree) of "b" = 1.0 unit.

Amounts of experience or training less than those listed above should be converted to decimal equivalents of 1.0 unit and added together when computing combinations of the different types of preparation.

3. 15 months of work experience comparable to that gained as a Financial Analyst/Planner I **in addition** to the experience/training required in 1 and 2 above.

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

None

Level III: Financial Analyst/Planner III**4789(0114)**

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. possession of credential requirements listed for the Financial Analyst/Planner II
2. 2 years of work experience comparable to that gained as a Financial Analyst/Planner II

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

None

Financial Analyst/Planner I
Financial Analyst/Planner II
Financial Analyst/Planner III

(NEW)
(REVISE)
(NEW)